

CASE STUDY

Technology at the helm of navigating the property boom

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Best Solicitors have long understood the power of leveraging technology across their firm. Already focused on paper-lite processes, they maximised their use of existing technology integrations between their suppliers to increase efficiency and future-proof their firm. **Head of Commercial and Residential Conveyancing, Liz Harris**, shares how a digital approach in conveyancing has provided a sturdy foundation for the firm.

November 2020

2020 hasn't shaped out to be the year anyone anticipated. Brexit loomed over the UK as we entered the transition period that would see us exit the EU come December 31st and many wondered what effects would follow. What no one saw coming were the challenges we have faced collectively since March.

With offices becoming a reminder of the 'old way' of operating overnight, businesses across the globe were forced to pivot. Finding alternative ways to work, technology has been at the crux of shaping the way we all operate, and law firms are no exception. We caught up with Elizabeth Harris, Head of Commercial and Residential Conveyancing at Best Solicitors, to understand the impacts the new societal norms have had on the firm and the role of technology in the narrative of 2020.

The role of technology throughout 2020 has been paramount in keeping the world moving. Many speculated over the impact Brexit would have on the legal industry and beyond as the transition year began to unfold, yet a catalyst for significant change was lingering just over the horizon. A nationwide lockdown imposed on March 23rd remapped the path for us all and the property sector came to a grinding halt. While moving home became near impossible for two months until the government announced in May it would restart, the lifting of restrictions didn't mean business resumed as normal. Liz Harris tells us: "2020 has resulted in a greater reliance on technology. Working remotely, communication both internally and with clients, it all changed."

This isn't a unique position for law firms, however, with a number of systems and processes still wrapped up in traditional methods requiring wet signatures and witnesses, finding a way to progress conveyancing transactions required a little bit of creative thinking complemented by the right technology to facilitate action.



Financial and social effects on conveyancing

The advantage of the conveyancing sector within the housing market sees law firms sitting on the periphery when it comes to feeling the effects on the home moving business, following larger scale changes to financial institutions. The restrictions imposed by lockdown changed this dynamic and conveyancers were right in the thick of it with estate agents and mortgage lenders. From March to May, very little activity took place. Although, once the Chancellor announced the immediate introduction of the Stamp Duty Holiday, the industry took a u-turn and a sharp rise in home moving dominated the sector. With the busiest few months in the property industry in a decade, how are Best Solicitors keeping up with demand? “We’ve relied on electronic means a lot more to manage communication with clients. We’re getting more creative and our clients are understanding of that,” says Liz.

As a housing boom increases pressure on firms, staffing and workload capacity are pushing the industry toward breaking point. Liz says her role over recent weeks has been supporting her team to cope with the boom. By encouraging them to use technology to its maximum capability they’ve been able to mitigate some of the challenges other firms are facing. “The commitment over the last 12 to 18 months with InfoTrack and Perfect Portal has made the transition to this busy period and the associated challenges of the last eight months easier.”



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Navigating the digital shift

Having grown the conveyancing operations of Best Solicitors by 200 per cent over the last two years, it would very much appear navigating the turbulence in the market throughout 2020 has been mitigated by suitable planning. But with firms now experiencing what was once the unthinkable, how can they adapt? It's required a strategy that focusses on futureproofing and employing leading technology.

Understanding the nuances of your business, how it performs and where efficiency can be made within processes is highly valuable in the positioning of the future of a law firm. We initially caught up with Liz in February where she shared that the team at Best Solicitors conduct fortnightly process review meetings that evaluate the business operations across the firm to look at areas which could benefit from improvements and increases in efficiency. "Processes from IT through to asset management and housekeeping. It's not only financial efficiency, we'll look at specifics like archiving and how we manage our conveyancing."

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Keeping business efficiency top of mind and prioritising tools and systems that promote long term planning are an asset to Best Solicitors. Liz says it goes beyond their internal handling too. "Service delivery is key. We examine how we appear when we're in front of clients as well, reviewing efficiencies from progress updates through our app to how we answer the phones."

When we revisited discussions with her earlier this month to see how those strategies benefited the firm in the face of the challenges over the past eight months, she told us investing in the technology over the previous 18 months was key. Benefiting from the integration between their case management system Tikit P4W, InfoTrack's end-to-end conveyancing platform and Perfect Portal's consumer-facing app, gave them an advantage. Best Solicitors had the skeleton with their technology and honed their skills, maximising their use of the integrations and various system features.

tikit

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“We didn’t require any major infrastructure changes. The changes have come from utilising the technology we have already invested in to get the most out of it and focusing on internal processes like case management hygiene. It gives us greater visibility when working remotely and everything is connected at the click of a button,” says Liz. “Had this happened three years ago, this firm would have been in a very different position.”



The spec for tech


Understanding the power of great technology solutions within their firm, for the conveyancing department and beyond, Best Solicitors are continually evolving their processes to generate greater savings. From resources to working within paper-lite and paperless processes, they scrutinise every aspect of their business to get

the most out of their investments. From a previously disjointed process, multiple suppliers and a piecemeal approach to obtaining information and completing tasks, to driving the firm toward their vision for growth and efficiency, technology has been influential in their approach.

Always prioritising the systems they use, when the opportunity arose for Liz to engage a series of providers that seamlessly integrated with each other to provide maximum efficiency, the decision was a no brainer. Understanding the value such a partnership offered the firm, the move to get the systems implemented within their practice was swift. Combining the benefits of the firm’s case management system, Tikit P4W, with conveyancing services provider, InfoTrack, and new business management system, Perfect Portal, has paved the way for surmountable productivity gains within their conveyancing department.

“Nowhere offers anything so comprehensive. It’s phenomenal how we coped without it.” Liz explains the systems offer state of the art communication between each other, pushing and pulling information to remove the need to rekey data. Eliminating the risk of errors, missed information and giving the team more time to focus on the technical aspect of legal they trained for has been a huge benefit.

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“Supporting your workload day-to-day in a holistic fashion can only be achieved by using all these systems in unison. To get the maximum benefit from each you need to be integrated,” Liz advises. “From quote to searches ordered and completed, indemnity requirements and post-completion as well as when you’re exchanging, all the data is there, streamlined and transparent. It’s slick,” she says.

With a strong focus to keep technological advancements at the forefront of development of efficiency within the firm, Best Solicitors’ forward-thinking approach to future proofing their firm has been instrumental in their successful navigation of new processes. Their adoption of digital conveyancing has seen them weather the storms of 2020 and they now look confidently to the future.

Ready to transform your conveyancing process digitally?
Get started with InfoTrack today.

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